



STATE OF CONNECTICUT
TEACHERS' RETIREMENT BOARD
21 GRAND STREET HARTFORD, CT 06106-1500
Toll free 1-800-504-1102 (860) 241-8426 Fax (860) 525-6018 www.ct.gov/trb

DISTRIBUTION OF INELIGIBLE FUNDS

Ineligible funds are those which have been erroneously submitted to the Teachers' Retirement Board, or have been submitted on behalf of individuals who are not eligible for membership (such as those not holding appropriate Connecticut certification).

Applicant's Name Last	First	Initial	Home Phone
Street Address	City	State	Zip Code
Social Security Number	CTRB Membership #	Maiden Name (if applicable)	

Check one election:

- ☐ I elect to have Connecticut Teachers' Retirement Board roll over the taxable portion of the refund directly to the Qualified Plan indicated below.
- ☐ I elect to have Connecticut Teachers' Retirement Board issue the refund of the account(s) directly to me. I understand that there will be an automatic 20% withholding for Federal Tax purposes.

I want Connecticut STATE INCOME TAX withheld in the amount of \$ _____

You may choose NOT to have Connecticut withholding, but by doing so, you are not relieved of any tax liability which may be due. **CTRB can only withhold State taxes for the State of Connecticut.** Questions concerning this distribution should be referred to the Connecticut Department of Revenue Services at (860) 297-5962.

Applicant's Signature	Date

NOTIFICATION OF INTENT TO TRANSFER TAXABLE BALANCE TO QUALIFIED PLAN

This is notification of my intent to transfer the taxable portion of my account balances held by Connecticut Teachers' Retirement Board.

The sums, which are being distributed under the provisions of the Connecticut Teachers' Retirement Board, are considered a qualified plan under section 401(a) of the Internal Revenue Service Code. Please issue a check representing the taxable portion of my distribution to my account as follows:

Name of Custodian/Trustee	Account Number		
Street Address	City	State	Zip Code

ACCEPTANCE OF CUSTODIAN/TRUSTEE

On behalf of the above-designated Custodian/Trustee, we will accept this money as a tax-free exchange under Section 402 of the Internal Revenue Code.

Authorized Representative Signature	Date